

YEAR-END | 2013

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MARKETING REPORT



PRESENTATION OVERVIEW

- **2013 Economic Overview**
- **2013 Travel Industry Overview**
- **2013 End of Year Branson Update**

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ECONOMIC OUTLOOK



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Consumer Confidence was up 16% in 2013, increasing from 66.7 to 77.5.

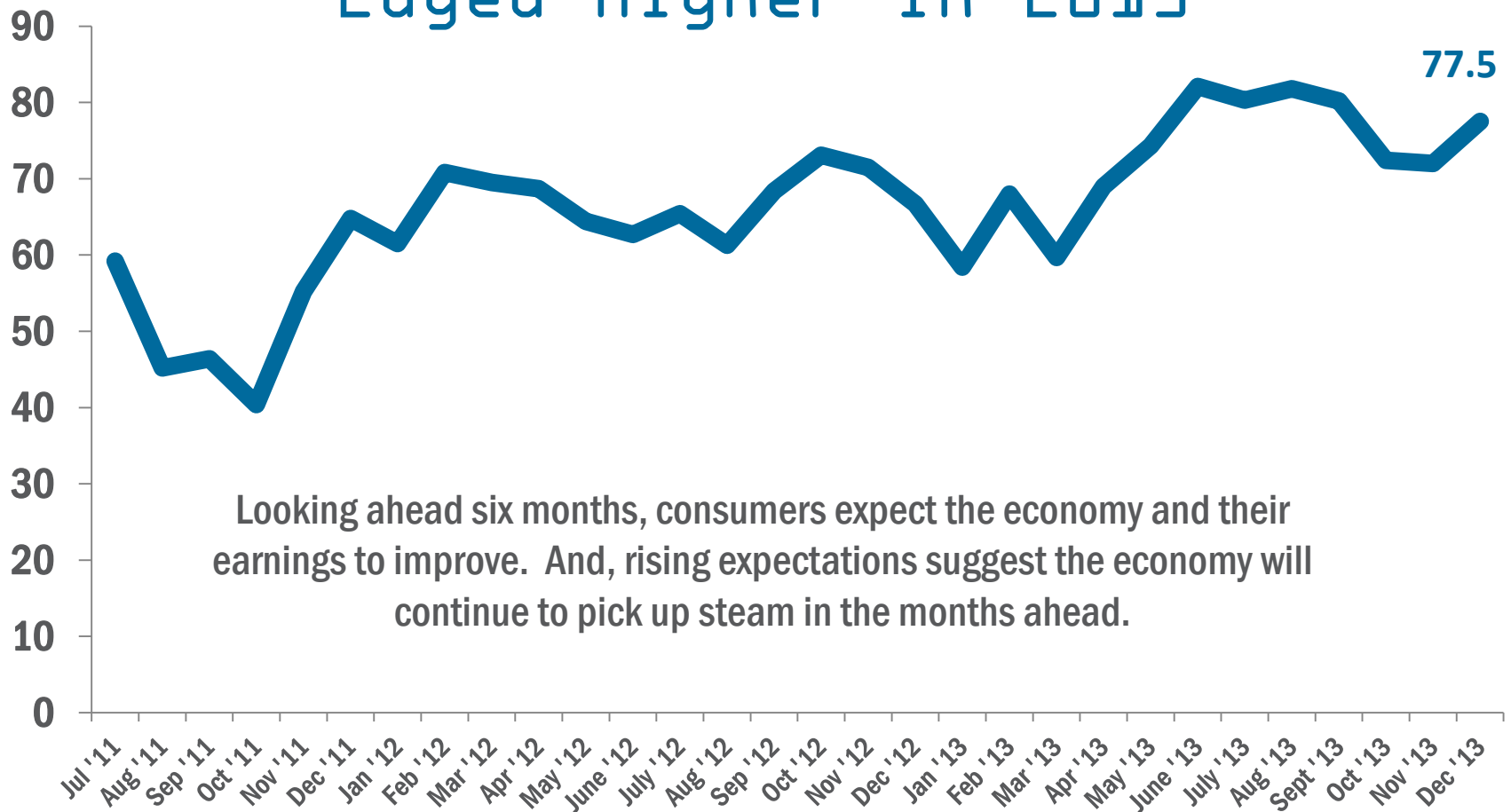


Source: The Conference Board

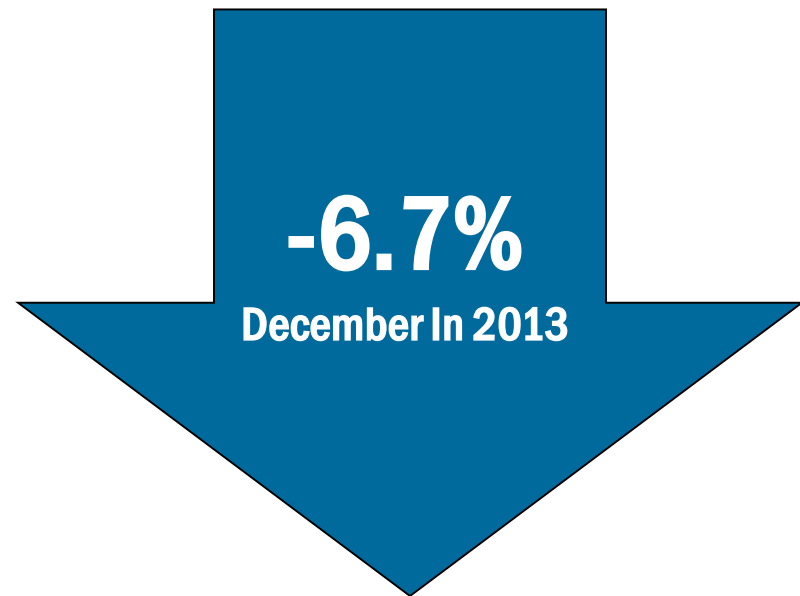


An index of 90 is considered necessary for sustainability and 100 is required for growth.

Consumer Confidence Edged Higher in 2013



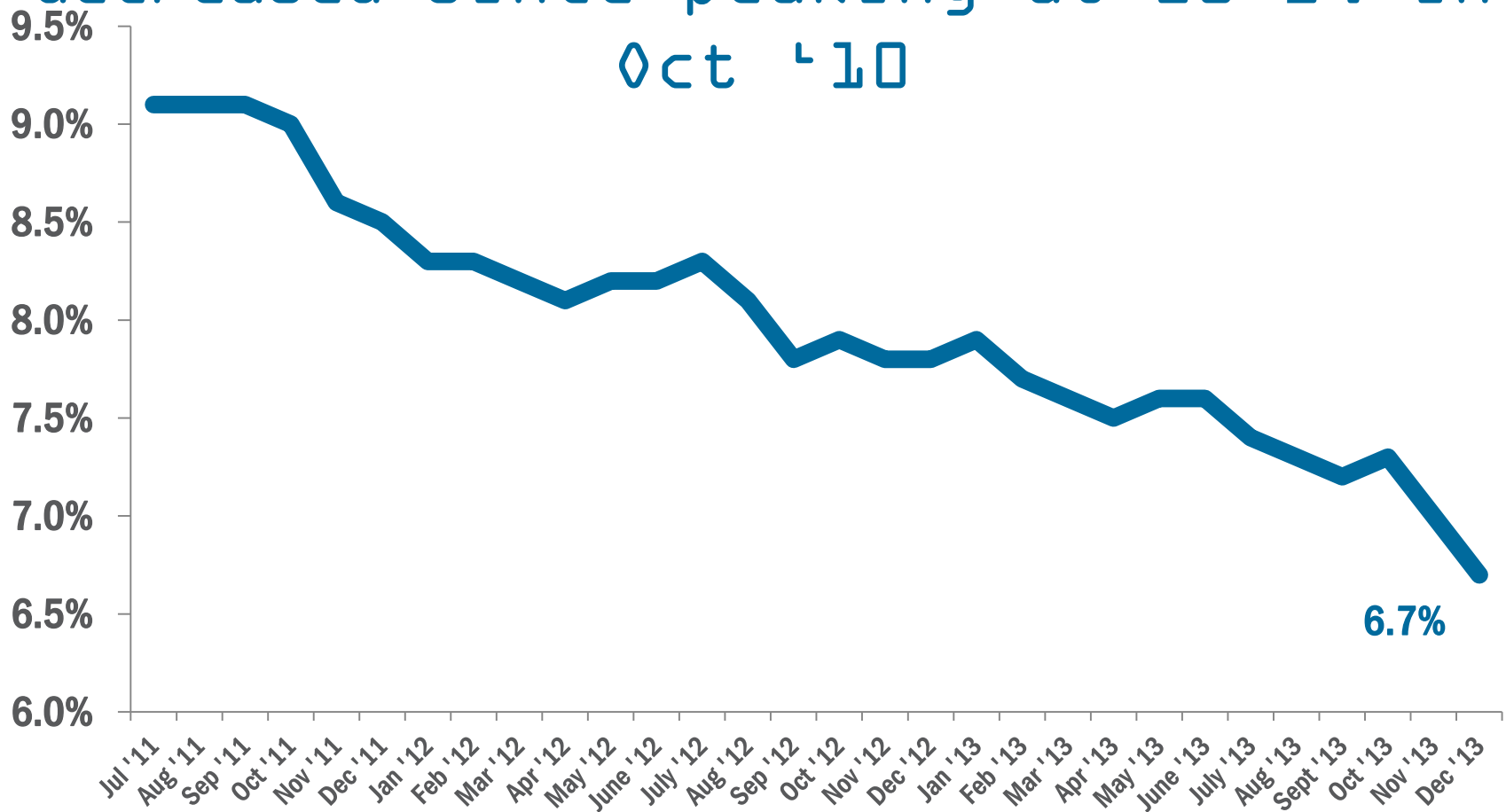
U.S. Unemployment Rate Stands at 6.7%, Down from 7.8% in December 2012



Source: Bureau of Labor Statistics

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U.S. Unemployment has steadily decreased since peaking at 10.2% in Oct '10



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U.S. Gasoline Prices Averaged \$3.20
in December 2013, Down 0.6% on the
Year.



-0.2%
In 2013

EIA reports that
gasoline prices are
down 0.2%
compared to Dec
2012.

Source: U.S. Energy Information Administration

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U.S. Gasoline Prices were at their
lowest point since January 2011



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The DJIA closed 2013 at
16,576.66,
up 26% for the year.



+26.0%

In 2013

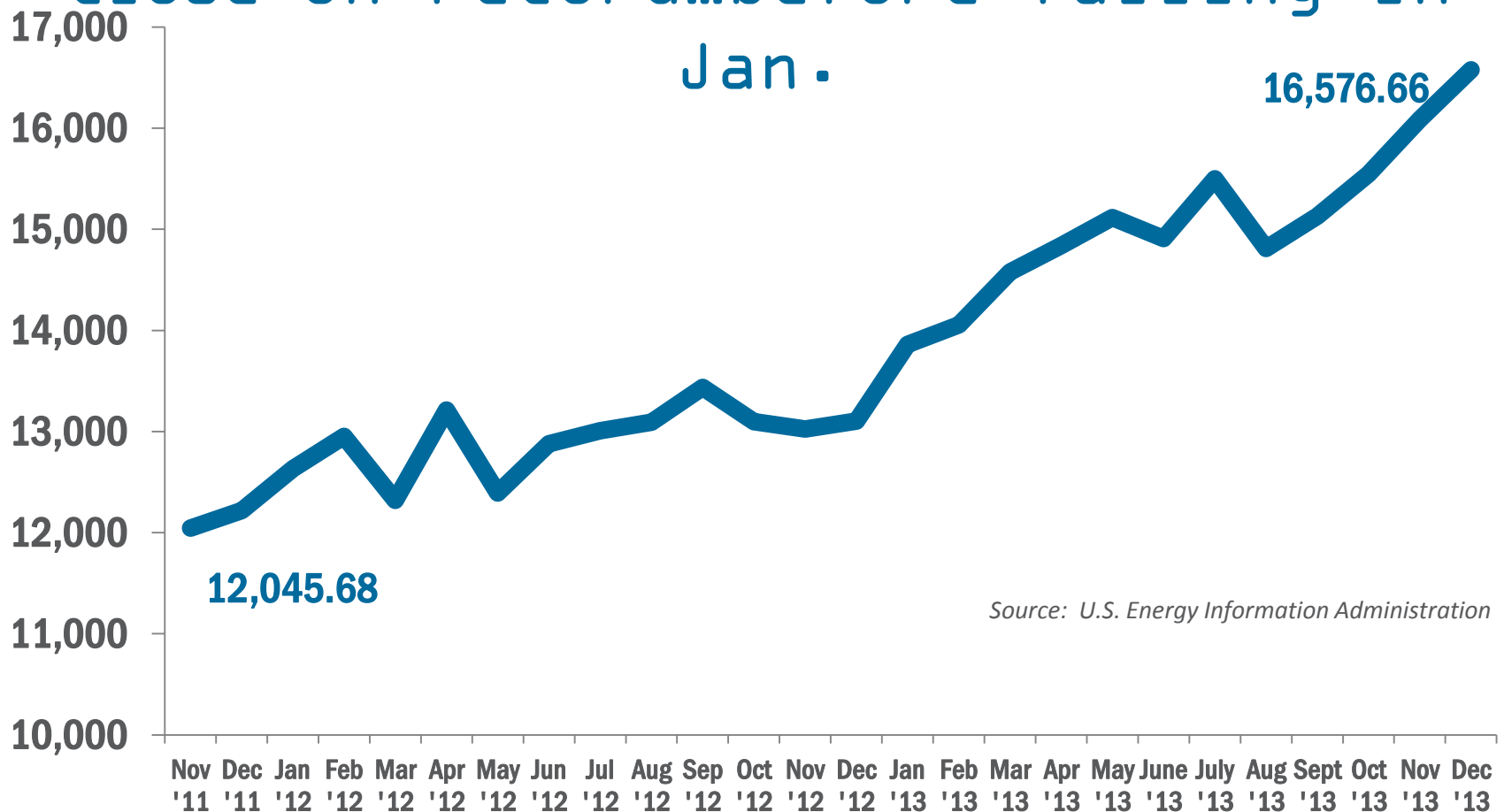
The DJIA hit
16,576.66 at the
end of December,
its highest
December close
on record.

Source: Dow Jones Industrial Average

However, as we all know, the market has fallen substantially since December 31.

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The DJIA was at its highest December close on record...before falling in Jan.

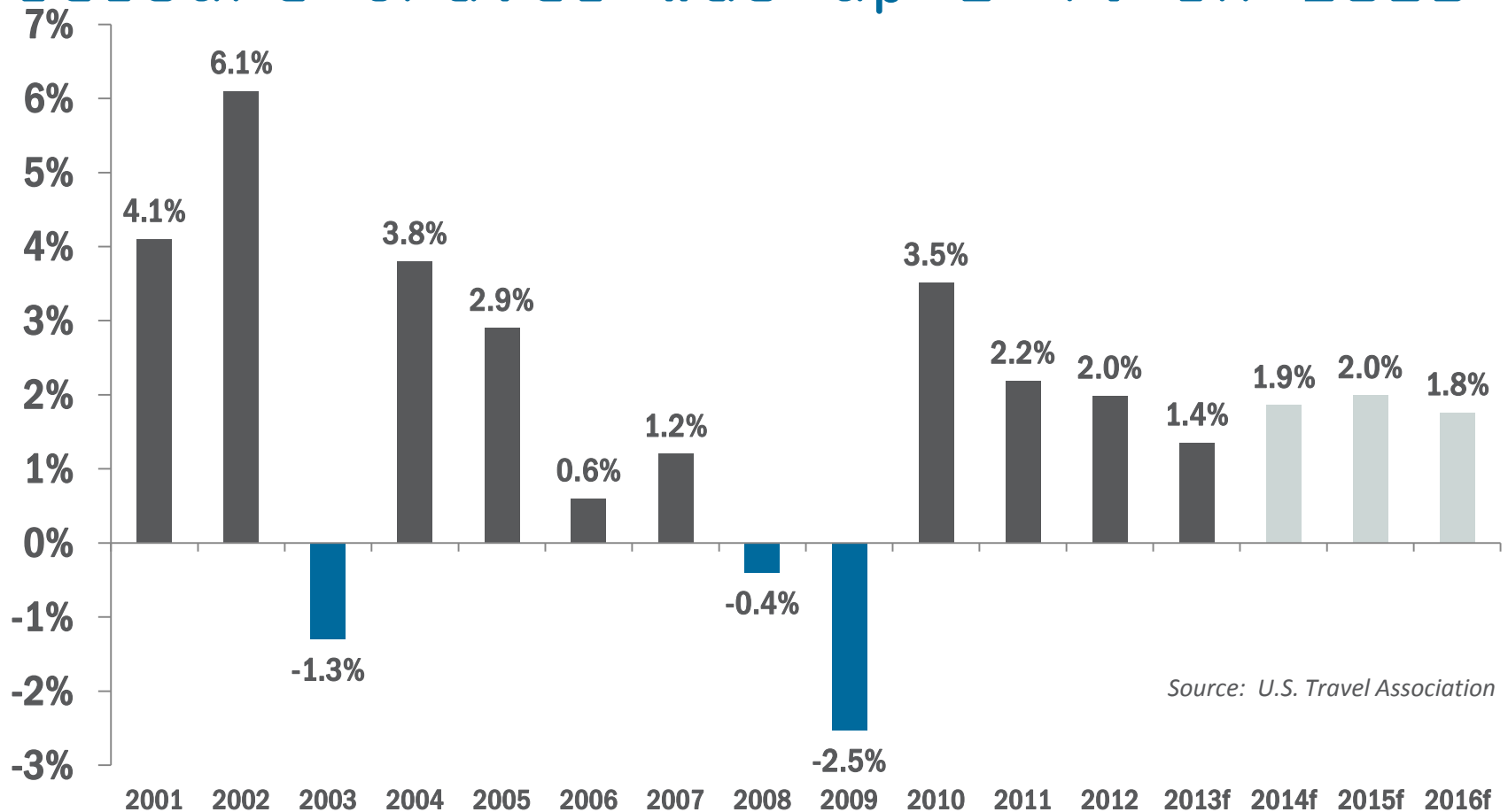


U.S. Travel Performance



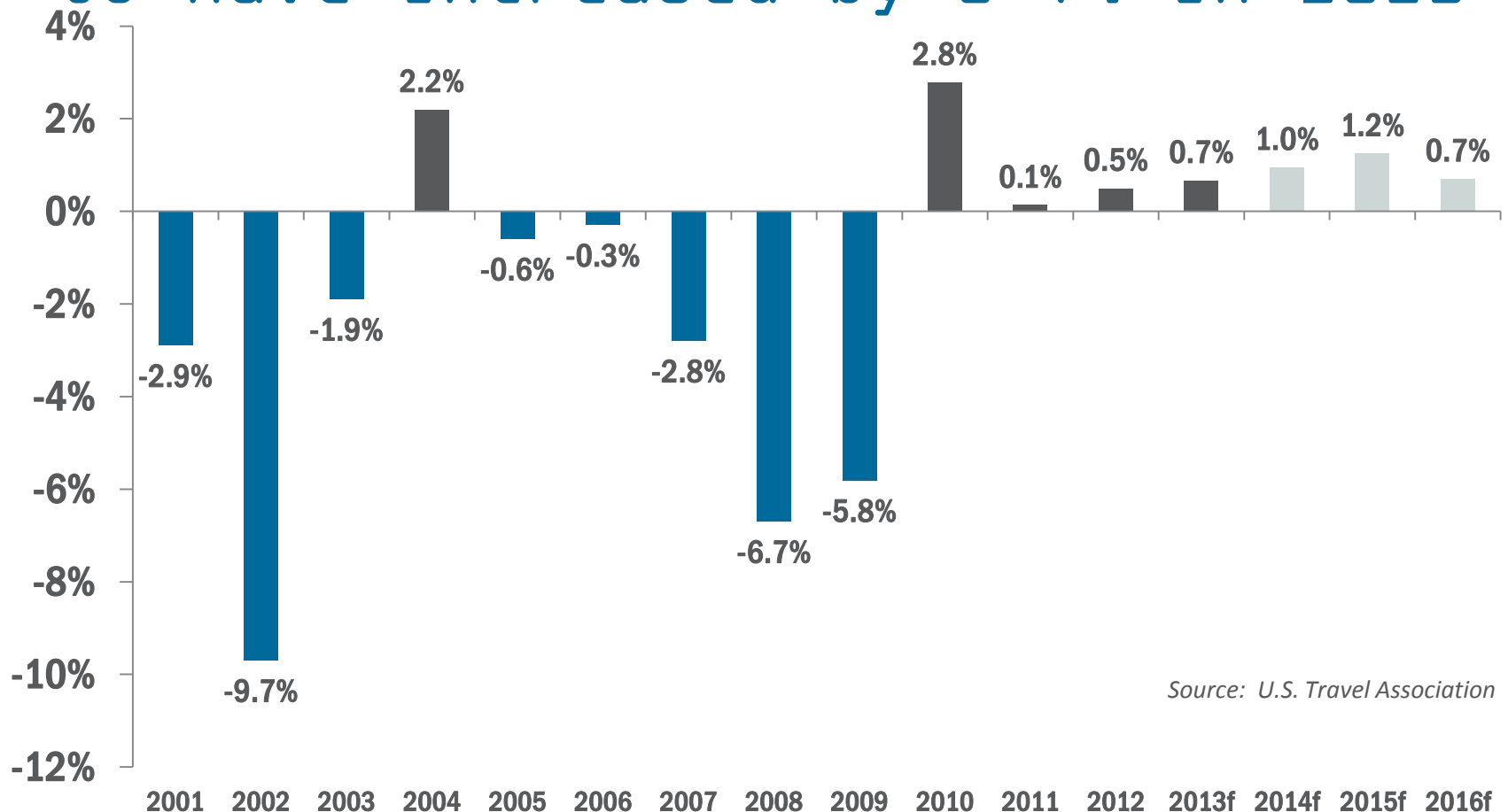
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The US Travel Association estimates leisure travel was up 1.4% in 2013.



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Business Travel Volume is estimated
to have increased by 0.7% in 2013



Source: U.S. Travel Association

Room Demand nationwide
Was up 3.6% in 2013.



+3.6%

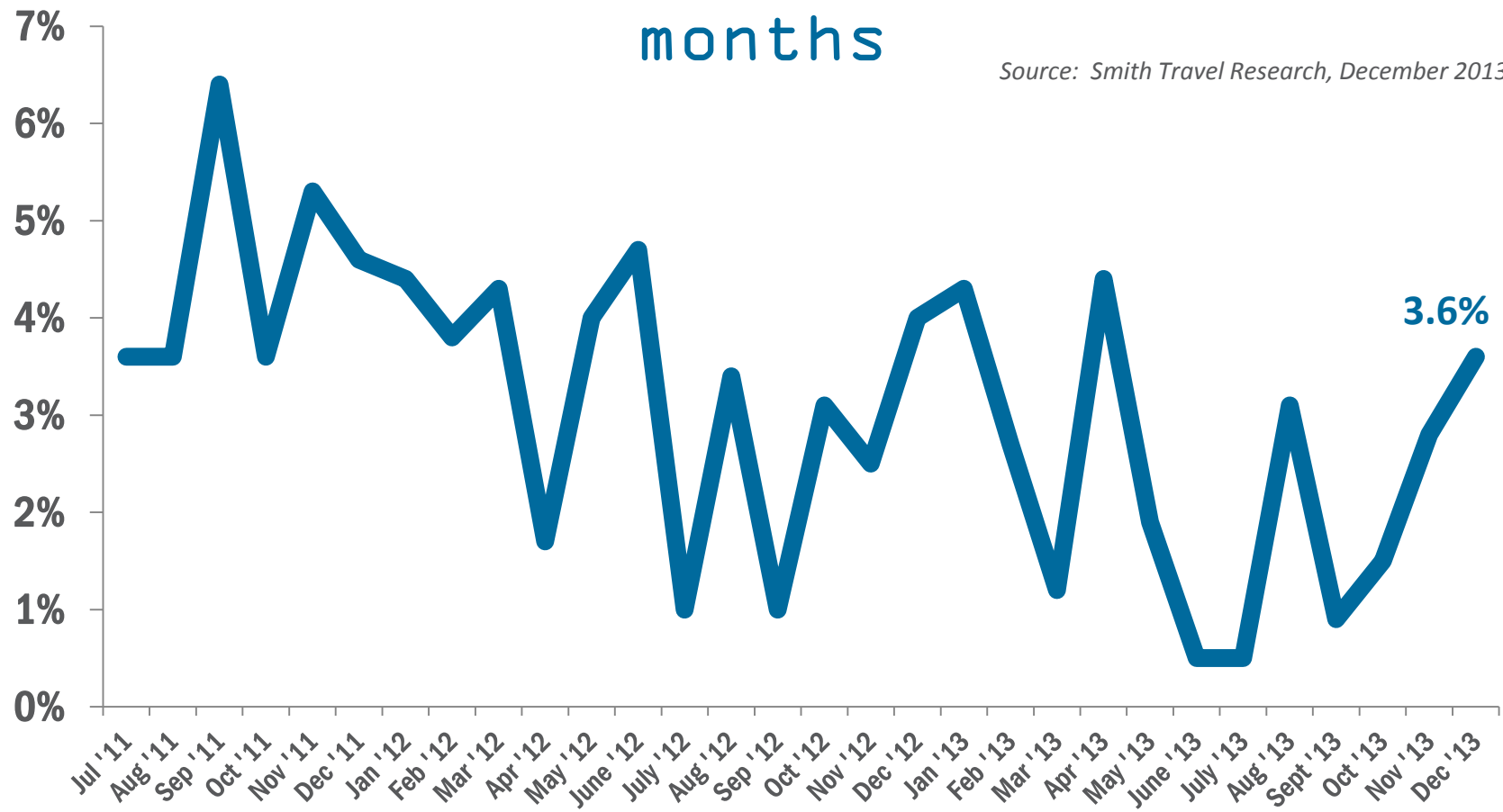
Past 12 Months

STR reports that
U.S. hotel/motel
room demand is up
3.6% over last year
with revenues
increasing 6.7%

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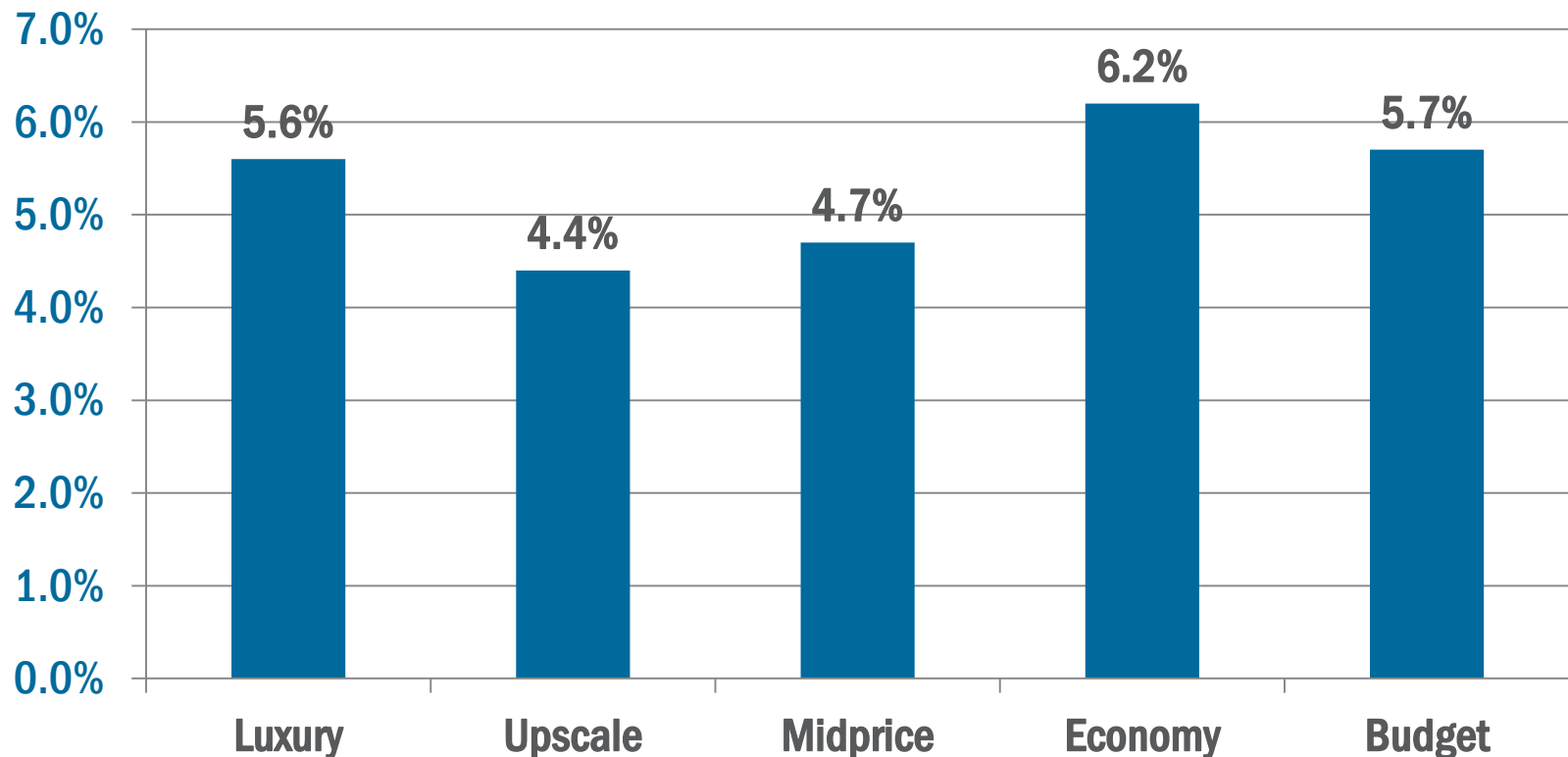
U.S. Hotel Room Demand has posted
increases in each of the past 49
months

Source: Smith Travel Research, December 2013



U.S. Room Demand is strongest at the higher and lower end price points

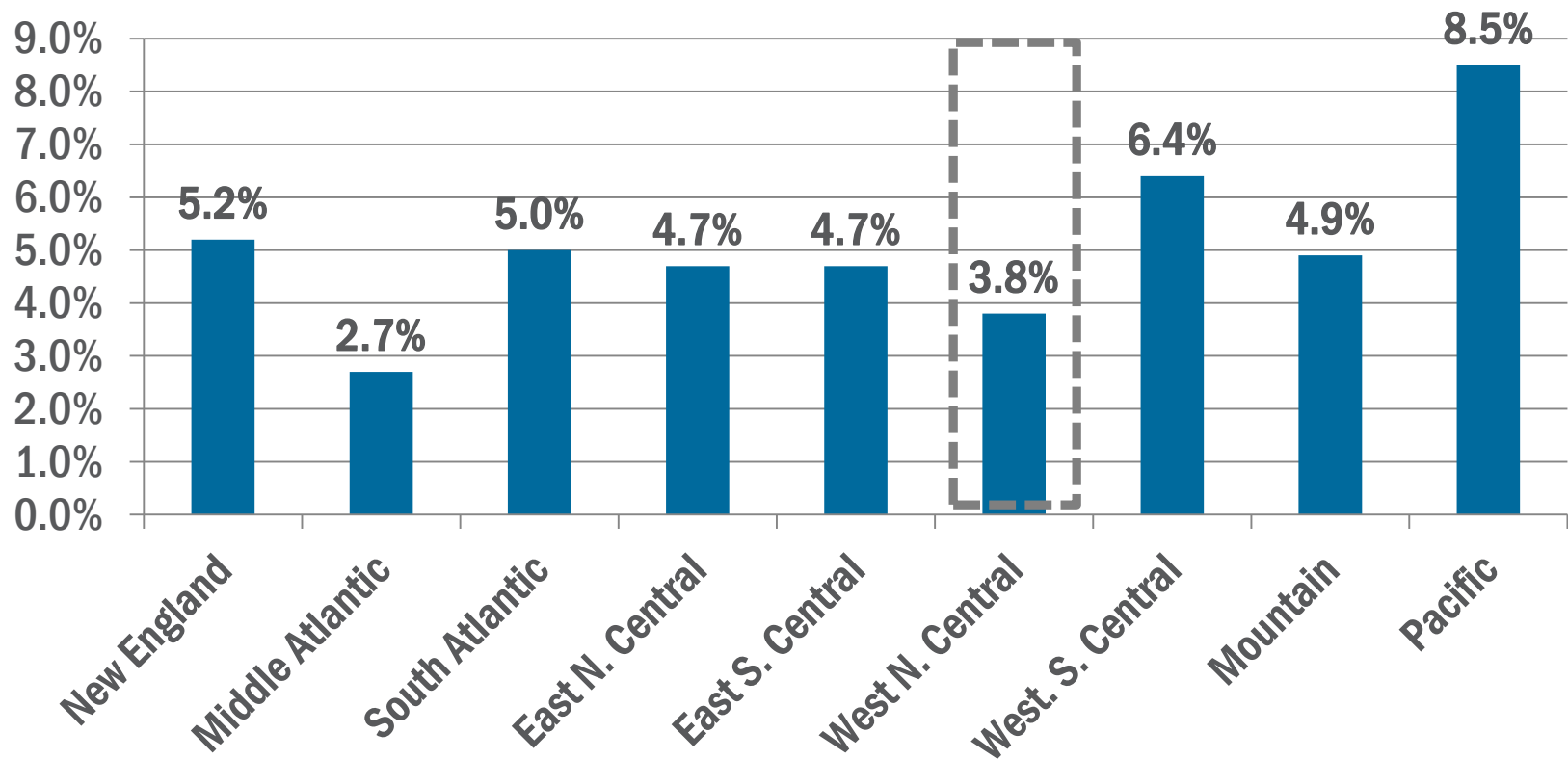
EOY Variance in Room Demand by Price Scale



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U.S. Room Demand is also strongest
in the Pacific region.

EOY Variance in Room Demand by Census Region



Travel Industry Update



Travel Industry Update

- According to Travel Weekly, 2014 should be a year of growth for the U.S. travel industry.
- Skift highlighted global travel trends that will drive the travel industry in 2014:
 - Rise of the silent traveler (digitally savvy, requiring little interaction)
 - Blurring of business and leisure travel ("bleisure travel");
 - Visuals, the new language of marketing in travel;
 - The rise of smart design in travel;
 - Rise of local in hospitality;
 - Low-cost carriers continue to eat the world;
 - Alternative transportation on the ascent;
 - Continued rise of metasearch.
 - Continued rise in Chinese independent traveler

Travel Industry Update

- **Cruise Industry.** The cruise industry, buffeted by disasters and breakdowns in 2012 and 2013, is finally seeing the bad publicity recede, according to cruise industry executives. Travel Weekly predicts that 2014 could prove to be the breakout year for cruise earnings.
- **Tour Operators.** Tour operators have high hopes for 2014. "We're seeing growth across all categories," said Jerre Fuqua, president of Travcoa and YMT Vacations and the incoming chairman of the U.S. Tour Operators Association (USTOA). According to a recent survey of active USTOA members, 93 percent anticipate a growth in sales in 2014, and 60 percent forecasted a "boom year." To stay current, tour operators are changing with the trends by heavily investing in back-end technologies, creating better and faster online inventory management and booking tools, creating new marketing materials, focusing more on customer service and integrating more mobile and social tools into their sales and marketing strategies.

Travel Industry Update

- **Luxury Travel.** In the luxury segment, optimism reigns. "The recent strength of the stock market will make it more likely for the affluent, who own more than 80 percent of all stocks and bonds, to increase their spending for travel," said Ron Kurtz, president of the American Affluence Research Center.
- One luxury area that is expected to see continued high demand and growth is health and wellness. The Global Wellness Tourism Economy report released by SRI International, projects wellness tourism will grow nearly 10 percent a year for the next five years—nearly twice the rate of global tourism overall, to reach \$678.5 billion by 2017. Wellness travel no longer means having a spa on-site, but covers a variety of destination spas and targeted programs such as yoga and meditation, boot camp weight-loss programs and detoxification, and health- and beauty-focused options.

Travel Industry Update

- **Air Travel.** Airline passenger numbers, which topped 3 billion for the first time in 2013, are expected to increase to 3.3 billion this year, according to the International Air Transport Association (IATA).
- **Lodging.** STR's latest forecast, released in September, projected occupancy to be up 1.4 percent, ADR to rise 4.2 percent and RevPar to increase 5.7 percent in 2013. "The outlook for the U.S. industry is very positive for the next 18 months," according to Amanda Hite, STR's president and COO.

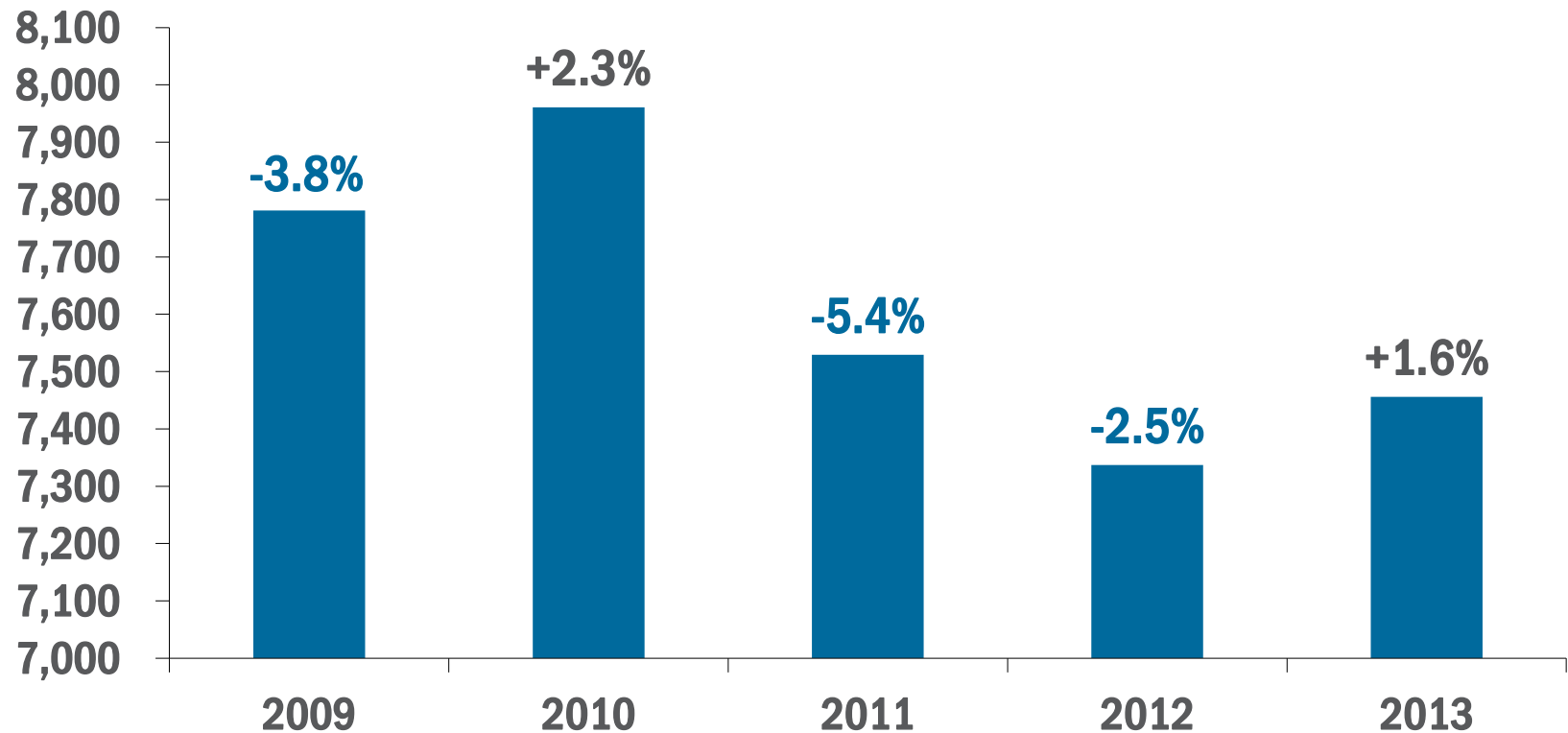
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Branson 2013 EOY Performance

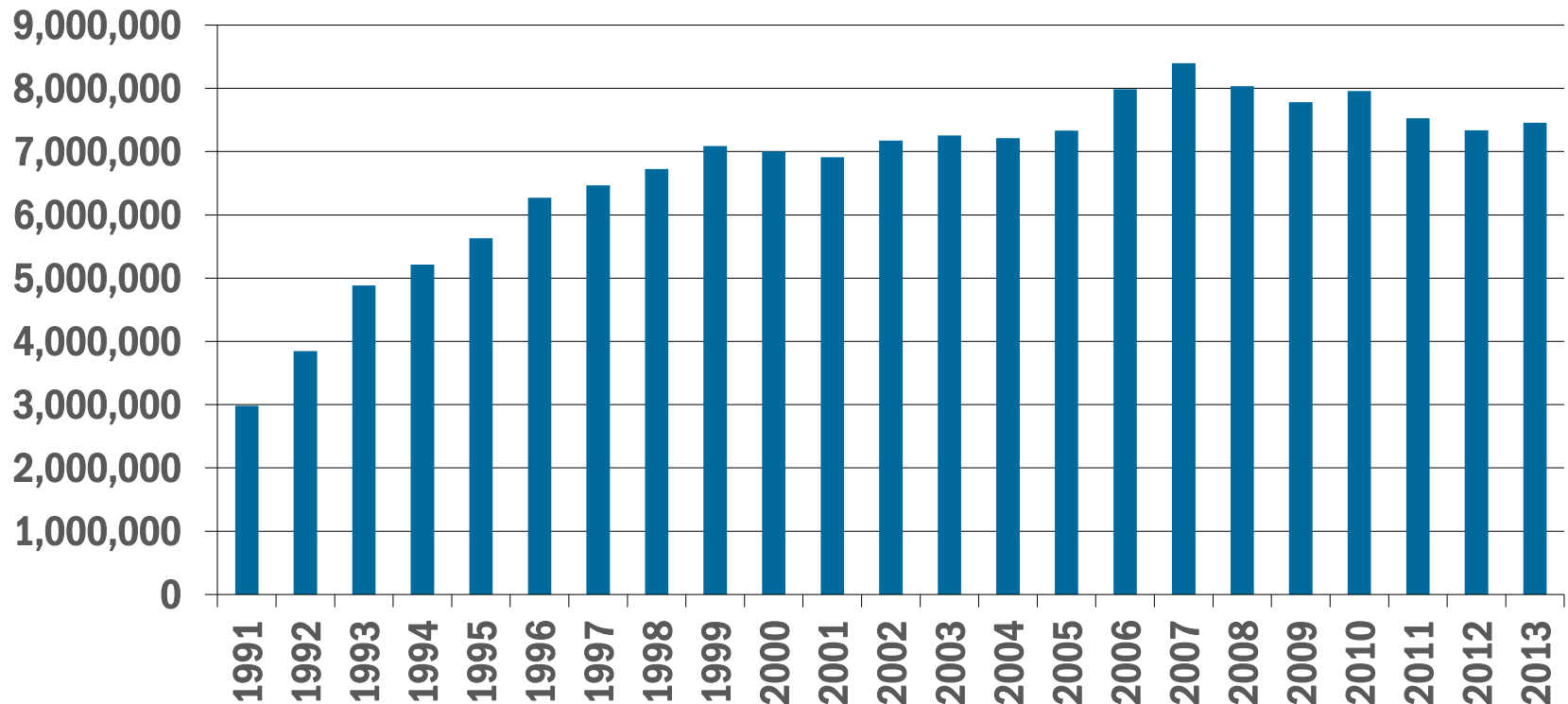


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BRANSON VISITATION EOY THRU 4Q 2013

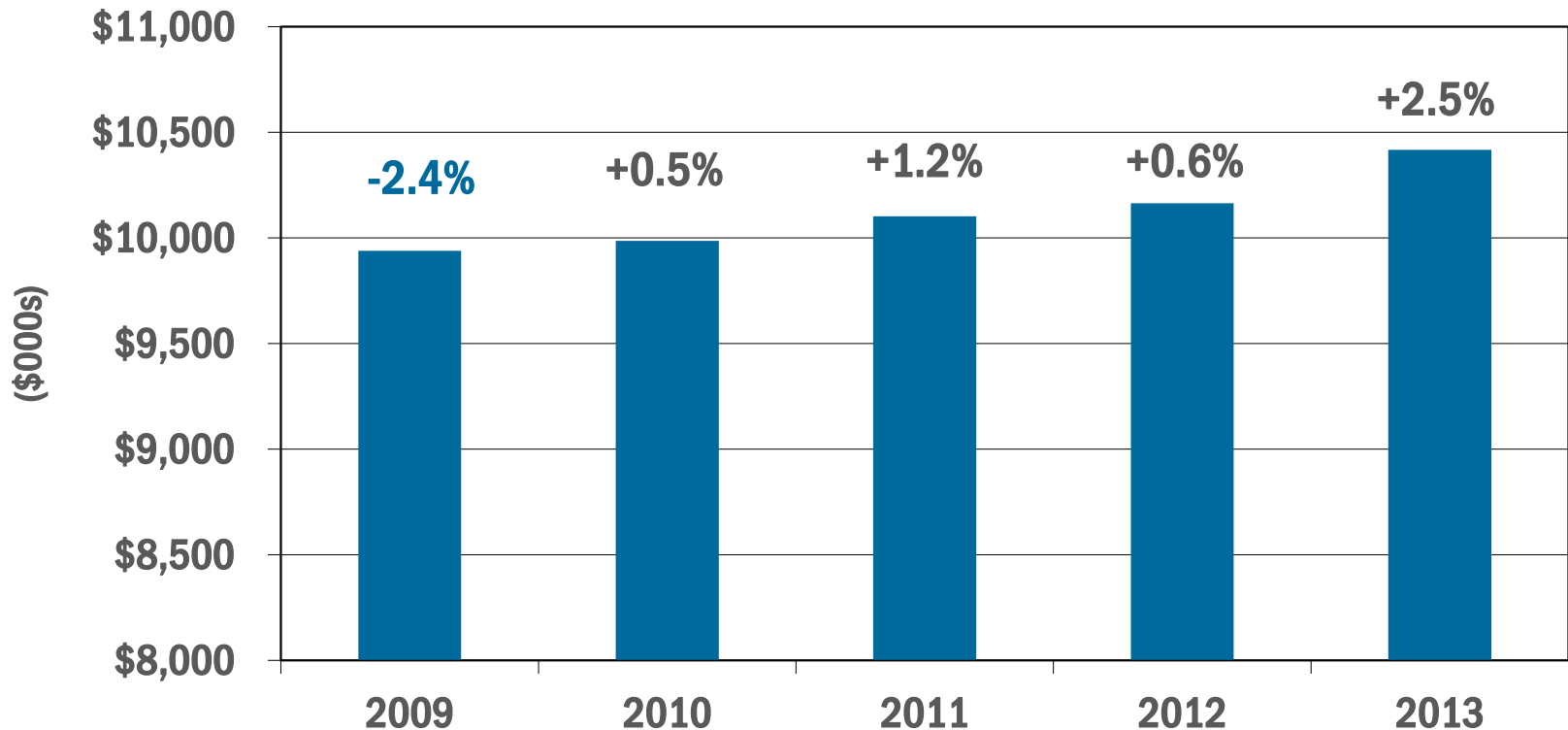


History of Branson Visitation 1991 - 2013



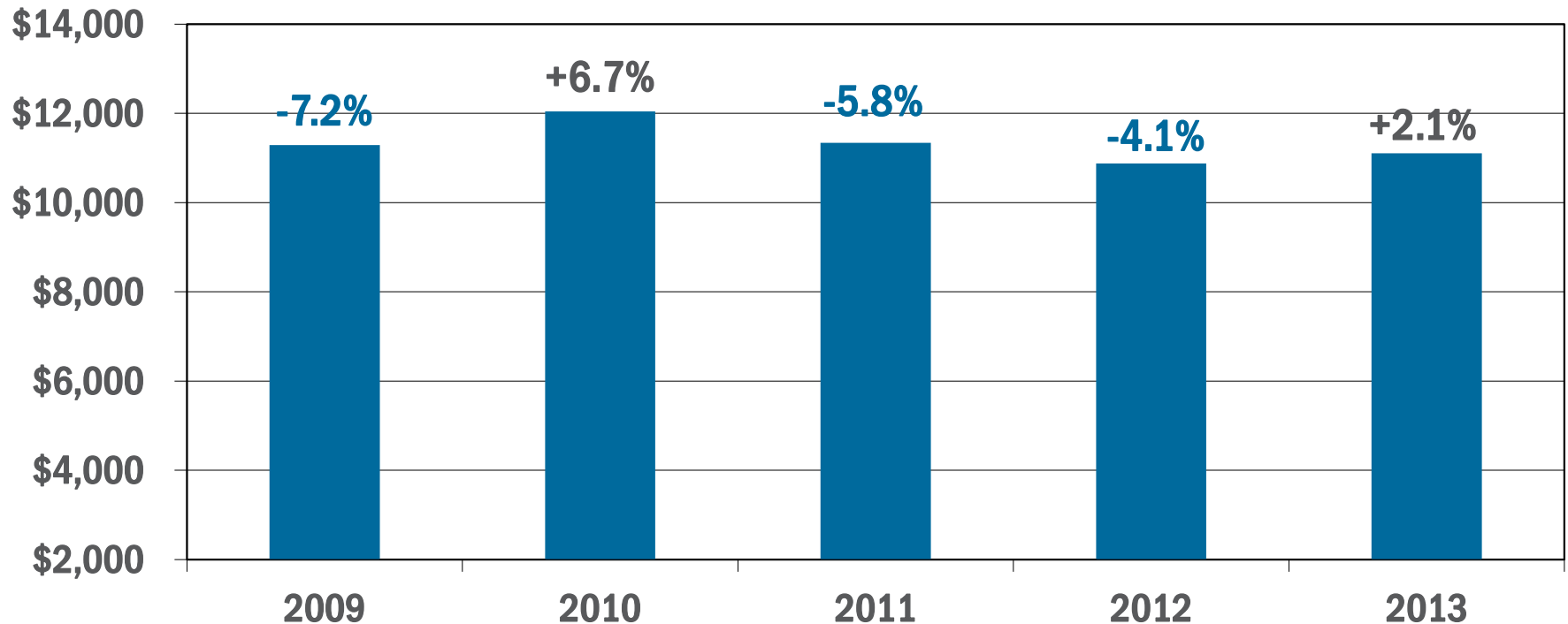
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City of Branson Sales Tax EOY thru Fourth Quarter 2013



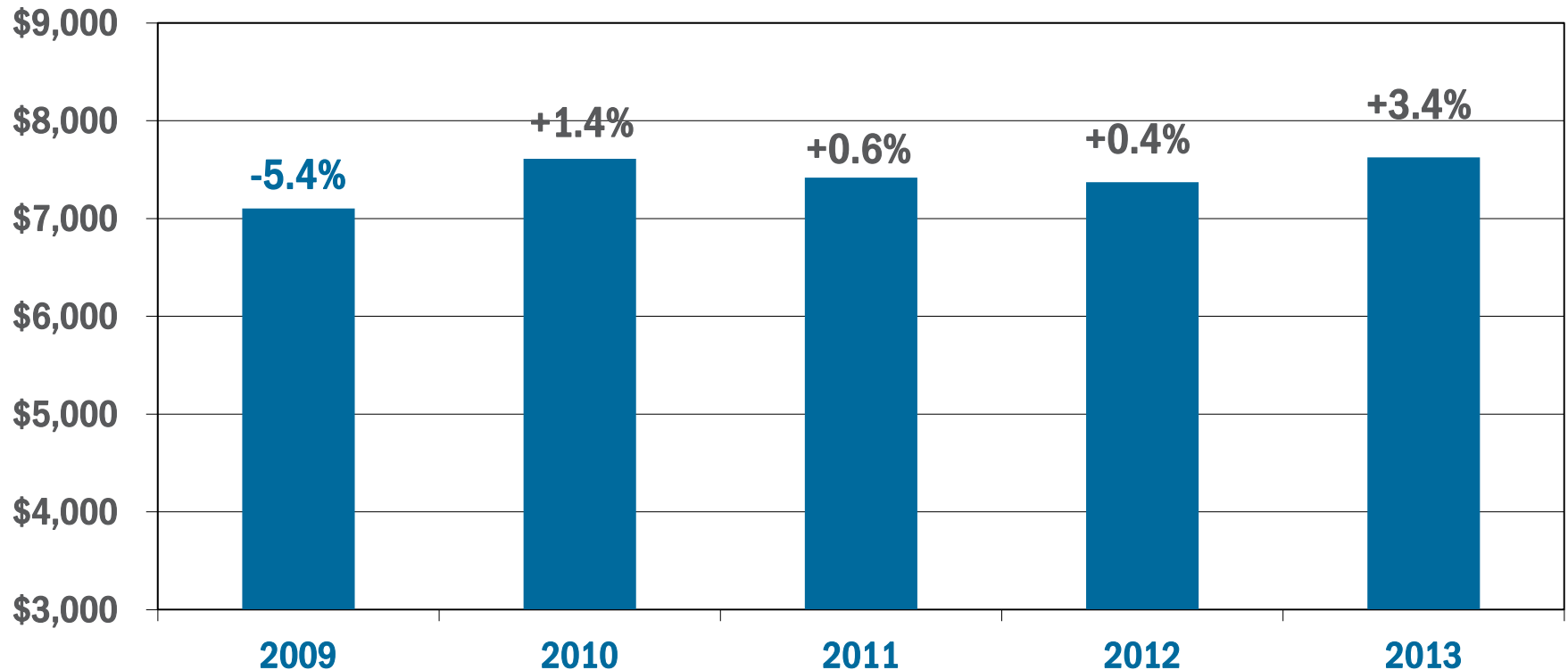
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City of Branson Tourism Tax EOY thru Fourth Quarter 2013

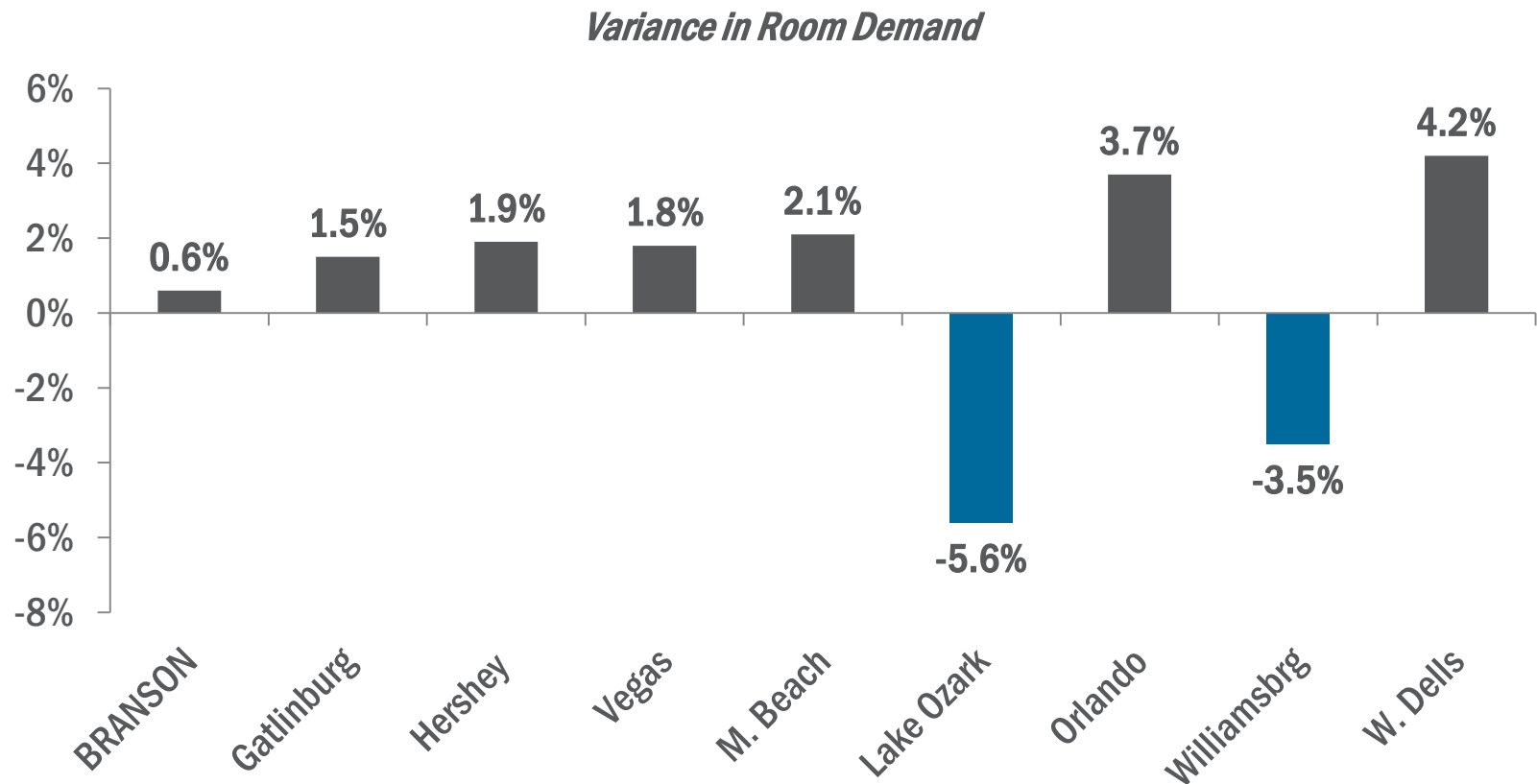


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TCED Tourism Tax EOY thru Fourth Quarter 2013



Room Demand Comparison EOY thru Fourth Quarter 2013





What else do we
know about
2013?

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2013 vs. 2012

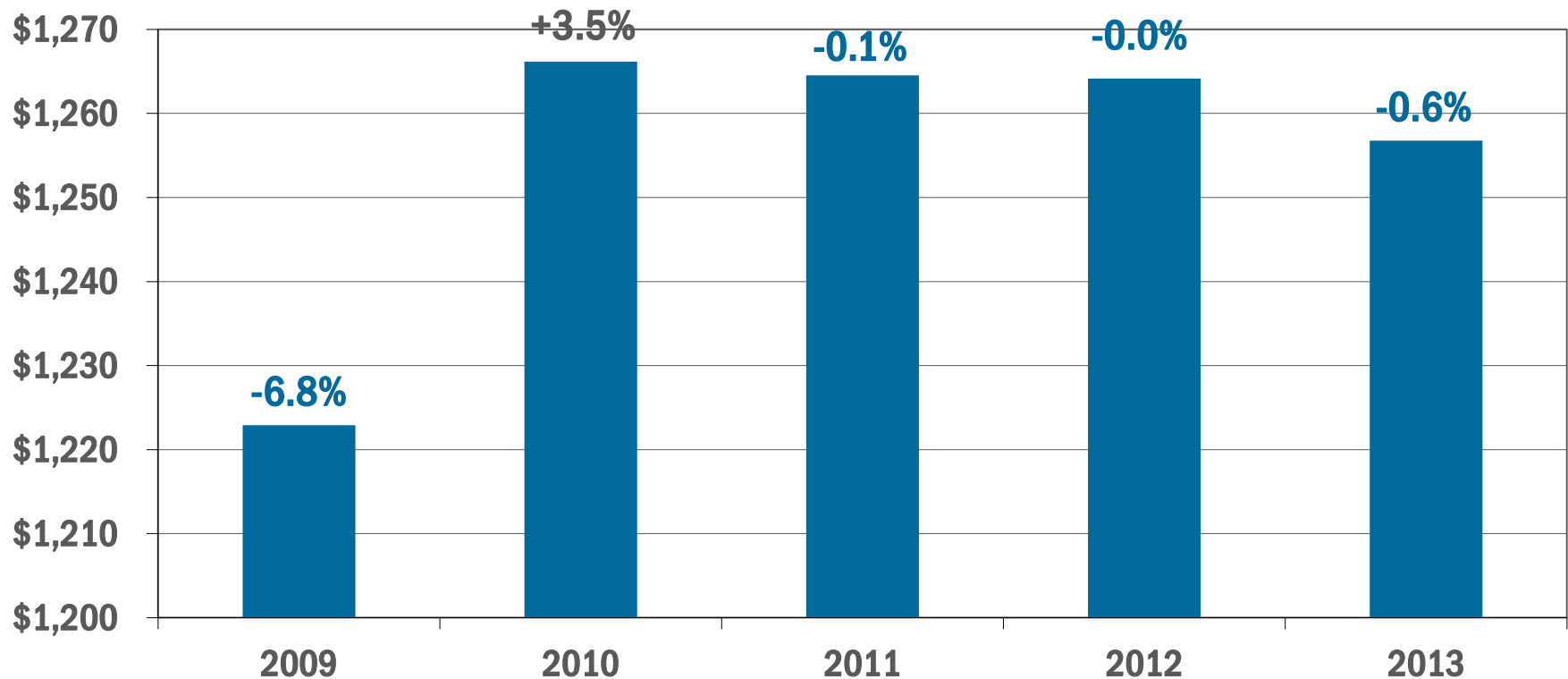
	2013	2012
• Spending per Party	\$974	\$962
• First-Time Visitors	24.4%	25.2%
• Families	35.2%	37.0%
• Average Adult Age	58.4 years	57.7 years
• Length of Stay	3.9 nights	3.9 nights
• Saw Shows	81.0%	78.6%
• Number of Shows Seen	3.3	3.2

2013 Visitation by Market

% of Visitors	Market	vs. 2012
• 15.2%	Core Markets (0-100 mi.)	+0.5%
• 28.0%	Primary Markets (101-300 mi.)	-6.3%
• 27.3%	Outer Markets (301-650 mi.)	+4.7%
• 29.5%	National Markets (650+ mi.)	+8.0%
• TOTAL VISITATION		+1.6%

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Water Usage EOY thru Fourth Quarter 2013



Source: City of Branson

Water Usage has high correlation

Empirical Metric

• Branson's 1% City Sales Tax	63%
• Tourism Tax	66%
• Taney County Tax	39%
• TCED Tax	50%
• Room Demand	63%
• Visitation Projections	69%

$r^2 =$

r^2 measures the percentage of variance in these empirical data points that can be explained by variances in water usage.

This data suggests that water usage is a valid and reliable measure of visitor volume in the Branson area.

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2013 LEISURE GROUPS

- **Attended 18 Leisure Group Travel Trade/Conventions**
- **Sponsored “Destination Branson” and “See The World in Branson”**
- **Produced four major FAMs in Branson**
 - 9th Annual MRPC
 - 7th Annual Music Director FAM
 - 5th Annual Travel Agent FAM
 - 6th Annual RFN Con FAM
- **Produced two major sales events outside of Branson**
 - 6th “Branson Bound For Your Town” – St. Charles, MO
 - “Branson Live in Dallas” – Dallas, TX



Hollywood Wax Museum Cat's Pajamas Outlaw Run | Silver Dollar City Acrobats of China

FEATURING OVER 100 LIVE SHOWS • SILVER DOLLAR CITY • TITANIC MUSEUM ATTRACTION
THREE PRISTINE LAKES • BRANSON LANDING • FISHING • BOATING • MUSEUMS • SPAS • GOLF
ZIPLINES • OUTLET SHOPPING • DINING • RESORTS • HISTORIC DOWNTOWN


Branson/Lakes Area CVB

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It's Your Show

2013 Interactive Results

**People reached online: 7.05 million
(+2.2%)**

- Websites: 1.32 million (-10.4%)
- Facebook: 5.59 million (+3.2%)
- Pinterest: 0.14 million (+12,500%)

2013 Online Advertising

	Impressions	Clicks	View-Throughs
Search Marketing	10.4 million	370,106	
Banner Ads	24.9 million	56,603	63,753
Retargeting/Prospecting	23.3 million	45,619	23,366
YouTube Ads	211,680 views	15,242	
TOTAL	58.8 million	487,570	87,119

Meetings, Conventions and Sports Sales

- The Branson CVB Meetings, Convention and Sports Department sent out 183 RFPs & booked 24,471 room nights in 2013 (a 13% increase over 2012 results).
- Attended 25 industry tradeshow and events.
- Hosted 48 meeting planners on site visits and hosted the Meetings Focus Live event in partnership with the Branson Convention Center.
- Hosted the Central States Shrine Association (CSSA) – bringing over 3,400 attendees to our destination in August.
- Convention services department worked closely with the CSSA, the Missouri Municipal League and many other convention groups to make their event in Branson a success.

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Conducted a meeting planner survey in late 2013 with H2R Marketing. Meeting planners shared media consumption habits, destination attributes most important to them and how likely they would be to select Branson for their next meeting. Full results can be found at explorebranson.com/portal.

- Sports Department booked the following large events in 2013 for the 2014 year:
Diva's ½ Marathon and 5K
Bassmaster's Elite Series Fishing Tournament
Get Stoked
Missouri High School Fishing Championship
- With our continued support of the boys and girls USSSA events, these groups will be returning in 2014. These groups represent over 16,000 participants and spectators.

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Public Relations: FAM TOURS, MEDIA REQUESTS and Ad Equivalency Values

	2008	2009	2010	2011	2012	2013
Fams	243	482	241	297	239	171
Media Req.	451	485	418	402	596	488
Ad Equiv.	\$13.2	\$19.8	\$10.1	\$11.6	\$20.5	\$15.8



Public Relations: Ad Equivalency Values

- PR Ad Equivalency of \$15.8 million produced a 43:1 ROI in 2013 (down from 2012 record of \$20.5 million and 55:1 ROI)
- Publicity Task Force effort in Houston, Chicago, Minneapolis and OKC brought significant TV, radio and print coverage.
- The third year of efforts by Geiger & Associates brought coverage from journalists that visited previously and produced more Branson copy from online sites and print publications.

THANK YOU.

